

Notes - VITA/Community Tax Centers - "Building Financial Success"

The goals for 2011:

1: Increase awareness of VITA especially with State agencies

2: Continue communication between VITA sites and RAISE Texas staff

- create VITA blog or message board on RAISE Texas website
- expand use of social media
- explore whether there is a need for a VITA Coalition?
- January - April let everyone do their VITA work
- May/June and beyond work on getting together to discuss best practices, what went right, wrong, etc.
- survey whether groups are interested in a collaborative application for the federal IRS grant?

3: Investigate existing or if necessary produce video/product to promote other financial products while waiting for appts.

- Continuous video loop for VITA site waiting areas
- Has someone already done it?
- Will it work in Texas?

4: Work on pitch for VITA as economic development

What is your economic development story?

How is VITA...

Increasing sales tax?

Creating jobs?

How do we measure that story?

*Develop outcome measures?

The discussion began with the group discussing five major activities.

1) What do new and emerging VITA program need?

2) What do existing program need? (for expansion)

3) Relationships with state government

Potential partnerships with state agencies

State legislation

4) Funding

Where to get \$?

IRS - groups that were successful, and unsuccessful at getting IRS grants

Possibility of collaborate application

5) How do we want to stay in communication?

Emails, conference calls, Blogs, Why are we meeting? Should we meet?

1) New/Emerging VITA sites' needs

- *Mentorship - collaboration with existing/experienced sightholders
- *Central/East Texas new site - several people in the group session volunteered to help support
- *Toolkit a vital resource
- *IRS representative contact also important

2) Existing site needs (for expansion/growth)

"Expansion / Growth" - number of returns processed, servicing new areas, adding sites, adding new functions

Discussion of appointments vs. just taking walk-ins vs. combo of both

-No consensus on best approach

Less focus on just output - returns, standard measures

Trying to define impact - How do we measure the success of what we are doing?

Major question: How does staff get clients to stay for more than one function (at the VITA site)?

Ideas:

- Get people to make an appointment to come back for other programs, products
- Maintain a database of new and returning clients
- Use background information to identify client needs and what program products they would benefit from
- Public service announcement loop playing while clients are waiting
- Foundation Communities waiting area as a "laboratory" for innovations (test how to offer different products)

Forming partnerships

Banks

Economic development councils (EDCs)

Neighborhood associations

Libraries

United Ways

Recreation centers

Community centers

Employers

High schools

Churches

Volunteers - where to go

AmeriCorps

Universities

Newspapers

High schools

Lions Club

Rotary Club

Senior centers

- ACE Program

Local corporations/companies
Financial institution employees

% of return volunteers - at least 50%?
% of return clients - 80%
% of clients with kids - too many!!
-use crayons, videos for child care

Best way to bring clients in - traditional media does not work well

Where do people get their information?

- Churches
- Word of mouth
- Importance of repeating the information - must hear frequently

3) Relationships with state agencies/government

Legislation - RAISE staff will be sending communication about why bills are important, etc.

*Bill passed last session that requires Texas Work Force Commission to share information about the

EITC; also requires Controller's office to have information about EITC and VITA sites on their website

Goals:

- Whenever someone calls a state agency (such as the Attorney General's Child Support Division, information about EITC and VITA while they are on hold
- Every state agency we know about - how do we integrate EITC/VITA into everything they do, especially communications from state agencies to people (letters, handouts/fliers, etc.)

4) Funding

Collaborative proposal for IRS grant next session? (Spring 2012)

6 groups in the room received IRS grants for this tax season

- City/county help?
- San Antonio (in past provided funds)
- Eagle County (has provided funds)

United Way

Do they run a site or give \$ (RFPs)?

How to write grants www.grantstation.com